



Registering a New Account in the Georgia Campaign Finance System (CFIS)

(Local Filing Officer Edition)



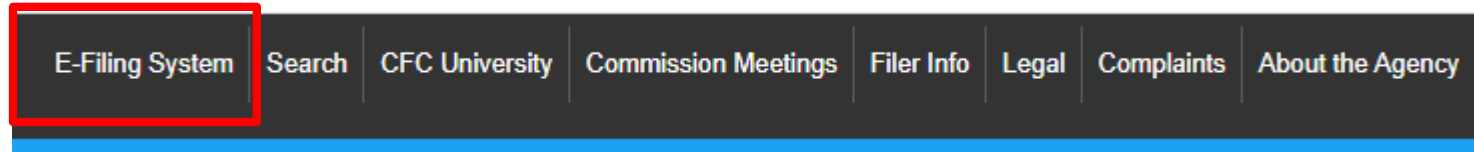


Registering a New Account

Local Filing
Officer
Information
Contact
Information
Signature
Block
Registration
Completed
Logging In
Uploading
Documents
Qualifying
Candidates
Election
Outcome
Updating
Accounts
Questions

Registering a New Account

- To register a new account, you will need to access the new e-filing system CFIS <https://efile.ethics.ga.gov/#/index>.
- You can also access the new e-filing system by going to www.ethics.ga.gov > click on **E-Filing System** > click on **New E-Filing System**



Legacy E-Filing System – Click here if you are a Lobbyist, Non-Candidate Committee (Political Party, PAC, Independent Committee, Recall Committee, or Statewide Referendum/Constitutional Amendment Committee) You can find archived records by searching our website here [[Legacy Records](#)]. Generally, the Commission has maintained electronic documents from 2006 to 2020. All physical hardcopies have a retention period of 5 years.

New E-Filing System – Click here if you are a State/Statewide filer, County and/or Municipal filer registering a campaign committee, or member of the general public.

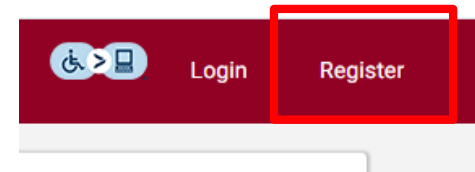


Registering a New Account

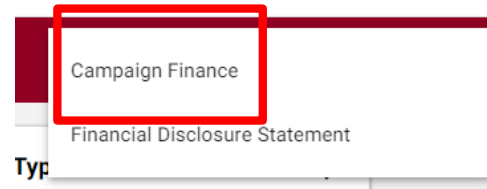
Local Filing Officer
Information
Contact
Information
Signature
Block
Registration Completed
Logging In
Uploading Documents
Qualifying Candidates
Election Outcome
Updating Accounts
Questions

Registering a New Account

- In the right-hand corner, click on **Register**.

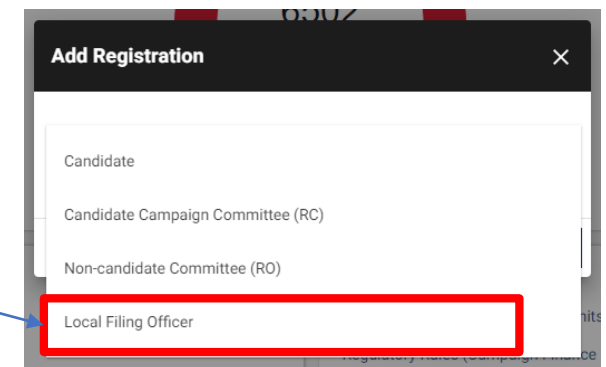
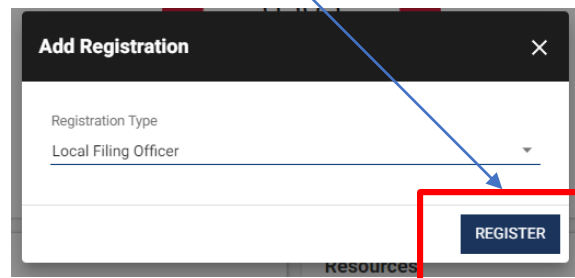


- Click on **Campaign Finance**



- Choose your **Registration Type**. You will choose the option “Local Filing Officer.”

- Click **Register**






Local Filing Officer Information

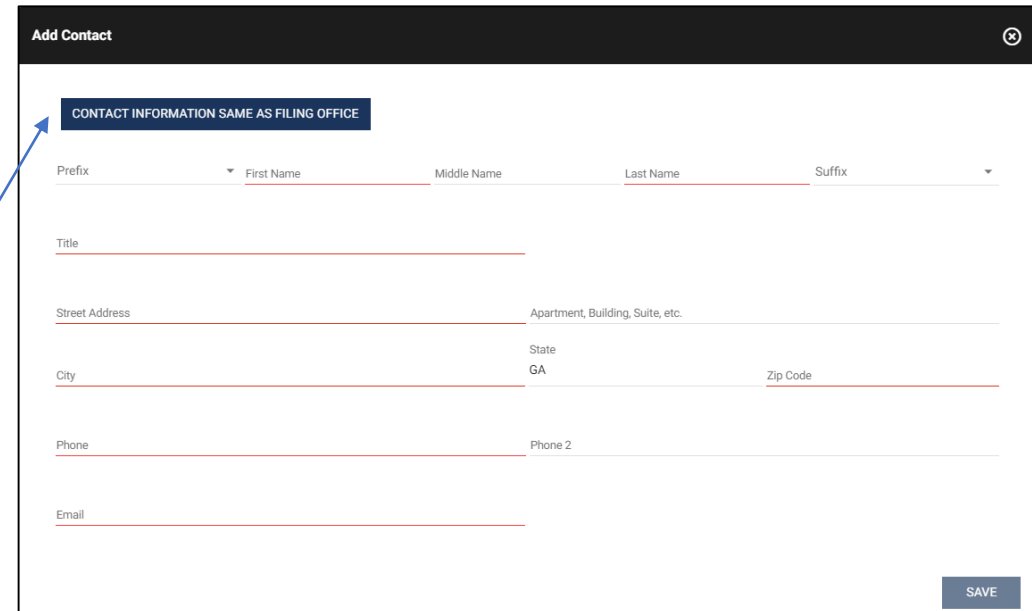
- After you click **Register**, you will be directed to the *Local Filing Officer Registration* screen.
- The first section to complete is the **Local Filing Officer Information** section.
 - Select a Local Election Office – This is a drop down menu of all the counties and municipalities in Georgia.
 - Add your office information – This section includes the address, phone, and email to your office. Everything underlined in **RED** is mandatory.
- You can either add the physical or mailing address for the Local Filing Office.



Contact Information

- The next section to complete is the **Contacts** Information.
- Click ***Add Contact.*** 
- Another dialogue box will appear that says Add Contact.
 - Add the First and Last Name
 - Add Title
 - Add Address
 - Add Phone Number
 - Add Email

If the information for the Contact Person is the **SAME** information for the Local Filing Office, click **Contact Information Same As Committee**. If you click that button, the address, phone, and email information will auto-populate. You will still have to add the first and last name and the title information.



Everything underlined in **RED** is mandatory.



Contact Information

- After you have added all of the required information, click ***Save***.
- The system allows a Local Filing Office to add up to five contacts. One contact is **REQUIRED**.
 - If you want to add additional contacts, click ***Add Contact*** and follow the steps in slide 5.
- **You will no longer use the Q number from the Legacy System.**
- The email of each contact is their username for the new e-filing system.

You will NO LONGER submit a pin application for access to the new e-filing system. The Commission will no longer accept pin applications for access to the new e-filing system.



Attestation and Signature Block

- Check the Attestation Box that states that all the information you entered is true and correct.
- Electronically sign your name.
- The date will automatically populate.
- Click ***Submit***.

☐ I do hereby swear (or affirm) that the foregoing information is complete, true, and correct to the best of my knowledge and belief pursuant to O.C.G.A. §§ 21-5-1, et. seq.; and 16-10-20.

Type Name Here

06/07/2021

Electronic Signature

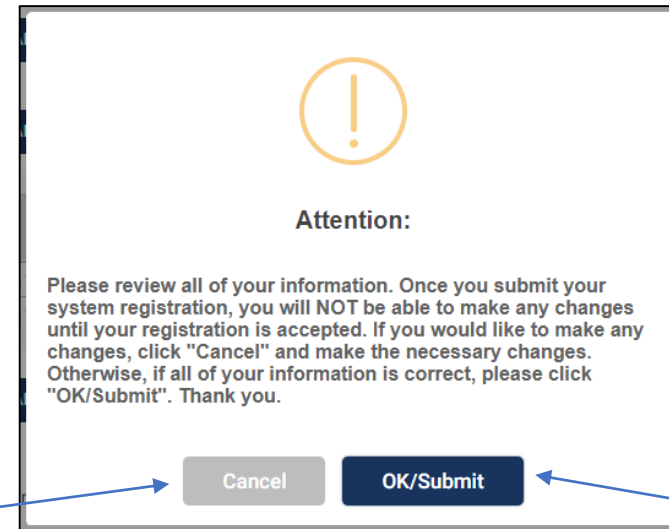
Date

CANCEL

SUBMIT

Registration Completed

- After you click Submit, you will receive a message that advises you to review all your information.

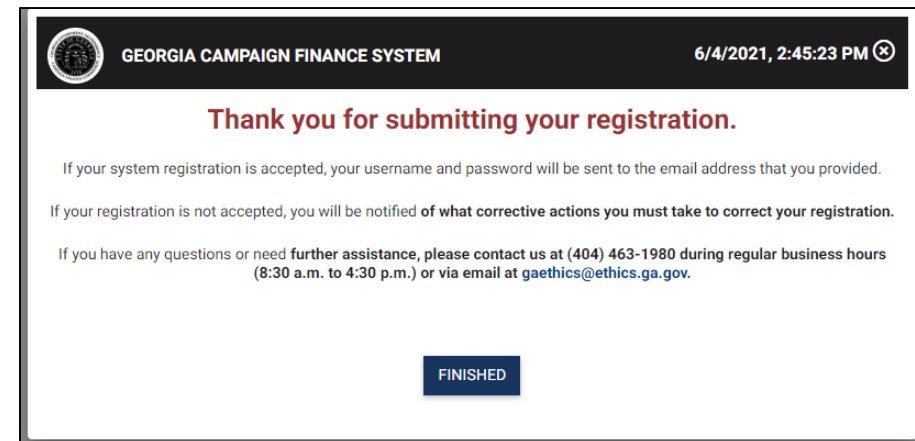


- You can click ***Cancel*** to go back and make changes or ***OK/Submit*** to submit your registration to the Commission.



Registration Completed

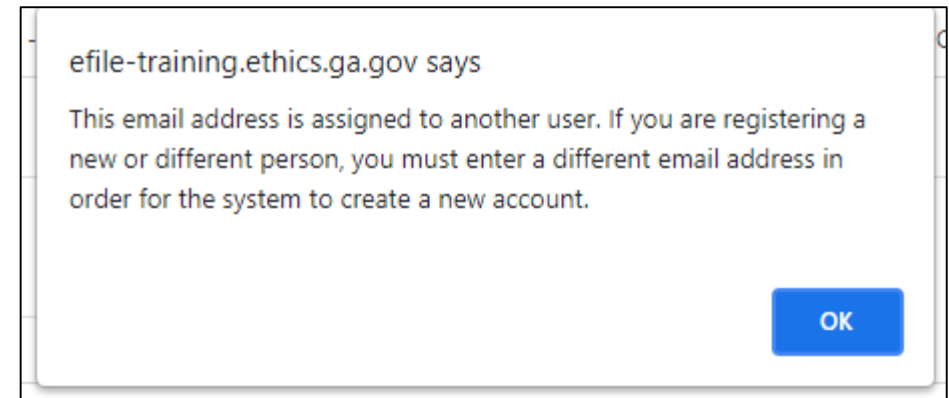
- After you click ***OK/Submit***, you will receive a message that states your registration has been submitted and awaits approval from the Commission.
- After you submit your registration, you will receive three emails from the e-filing system:
 - Pending New Registration Email
 - Candidate Acceptance Email
 - Credentials Email





Registration Completed

- If you enter in an email that was used for another account, you will receive this message:
- Click ***Ok***.
- That just tells you that the email belongs to another account. If you ran for more than one office and used the same email, you will receive that message.



You technically should not receive this message if each contact person has their own email. If you have contacts sharing emails, you will receive this message.



Registration Completed

- The Credentials Email will have a link that will direct you to set up your password and security question information.
- The Credential Email link is only good for 120 consecutive hours. If you do not set up your password and security question in the allotted time, you will have to contact the Commission to resend you an authentication link.
- After you created your password and security question, you can log into the system here <https://efile.ethics.ga.gov/#/index>.



Logging into the New E-Filing System.

- Once you have set up your account, and received your login credentials, log into the new e-filing site here <https://efile.ethics.ga.gov/#/index>.
- You will be directed to the *Home Screen* of your account. Click on ***Filer's Dashboard***.

This side list your table of contents. The only links accessible to Local Filing Officers are Home, Filer's Dashboard, Public Site, and Logout.

You are working on behalf of Adel.

EXIT

Local Filing Officer

CORRESPONDENCE/DOCUMENT IMAGES

Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
Credentials Email - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Adel	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Pending New Registration - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮

4 results

Local Filing Officer Details

Filer ID
6829

Filing Office
Adel - Active

Address
123 Adel Way, Adel, GA 30833

Email
adellocalfilingoffice@mail.com

Type
Local Filing Officer

Registration ID
6587

VIEW REGISTRATION

Officers

James 0510, Susan
Contact
(480) 083-1212
sjames@mail.com

This side list your Local Filing Officer Details and Officers.



Uploading Documents

- Local Filing Officers are required to submit copies of **ALL** campaign finance documents received to the Commission.
- Below is the schedule for when Local Filing Officers are supposed to send copies of campaign finance documents to the Commission:
 - **Form DOI:** submit a copy no later than 10 days after receipt.
 - **Affidavit of Exemption:** submit a copy no later than 10 days after receipt.
 - **Campaign Contribution Disclosure Report:** submit a copy no later than 30 days after the close of **EACH** grace period.
 - **Personal Financial Disclosure:** submit a copy no later than 30 days after the close of the reporting period.
 - **Two Business Day Report:** submit a copy no later than 10 days after receipt



Uploading Documents

- Traditionally, these documents were sent via email to localreports@ethics.ga.gov or via fax following the directions found here <https://ethics.ga.gov/efax-instructions/>.
 - **The preference of the Commission is that Local Filing Officers electronically submit their documents instead of faxing them.**
- Instead of emailing the documents, the Local Filing Officer will now upload those documents to the new e-filing system.
 - The option to email will still be available until we turn off localreports@ethics.ga.gov.
 - **ALL** Local Filing Officers will eventually have to use the new e-filing system to submit documents.



Uploading Documents

- In the new e-filing system on your Filer's Dashboard, click ***Upload***.

CORRESPONDENCE/DOCUMENT IMAGES

CORRESPONDENCE/DOCUMENT IMAGES **UPLOAD** Document Type ▾

Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
---------------	---------------	------------	------------------	---------------	---------

- You will be directed to the *Upload Image* screen.

UPLOAD IMAGE ✕

Select File No file chosen

Document Type ▾

How Filed ▾

Document Name

Date Received 📅 Enter date ▾

Associated Statement ▾

Comments

CLEAR IMPORT



Uploading Documents

- Choose the Document Type.
 - The document types Local Filing Officers will use the most are:
 - **Local CCDR** – This **MUST** be used when uploading campaign contribution disclosure reports.
 - **Personal Financial Disclosure Statement** – This **MUST** be used when uploading Personal Financial Disclosure Statements.
 - **Affidavit Not to Exceed \$2,500** – This **MUST** be used when uploading the Affidavit of Exemption.
 - **Registration Form** – This **MUST** be used when uploading a Declaration of Intent to Accept Campaign Contributions form.
 - **Other – Public** – This **MUST** be used when uploading Two Business Day Reports, Qualified Candidate, and Election Outcome Information.
 - **Correspondence – Public** – This **MUST** used when uploading any correspondence between the Local Filing Officer and candidates and/or elected officials.



Uploading Documents

- Select File.



- Choose How It Was Filed.

- In-Person
- Mail
- Email
- Fax

- Input the Document Name.

- **ALL** Local Filing Officers **MUST** follow the naming template provided by the Education Department at the Campaign Finance Commission. There is no dropdown menu for document names. You will have to manually input that information.



Uploading Documents

- Document Name Templates
 - **Declaration of Intention to Accept Campaign Contributions (Form DOI)** – *First name, Last Name – Year | Document Name – Office Name – Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2021 Form DOI – City Commissioner, District 1 – November 2, 2021
 - **EX:** Sally Smith – 2018 Form DOI – Sheriff – November 6, 2018
 - **EX:** London Jones – 2020 Form DOI – Probate Judge – June 9, 2020
 - **Local CCDR** – *First name, Last Name – Year | Document Name – Office Name – Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2021 June 30th Non Election Year CCDR – County Commission, District 1 – November 3, 2020
 - **EX:** Sally Smith – 2019 December 30th Non Election Year CCDR – Sheriff – November 6, 2018



Uploading Documents

- Document Name Templates
 - **Personal Financial Disclosure Statement** – *First name, Last Name – Year / Document Name – Office Name*
 - **EX:** John Doe – 2020 Personal Financial Disclosure Statement or PFDS - Coroner
 - **EX:** Sally Smith – 2019 PFDS – Sheriff
 - **EX:** London Jones – 2020 PFDS – Probate Judge
 - **Affidavit Not to Exceed \$2,500** – *First name, Last Name – Year / Document Name – Office Name – Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2018 Affidavit of Exemption or Affidavit Not To Exceed \$2,500 – Tax Commissioner – November 6, 2018
 - **EX:** Sally Smith – 2017 Affidavit of Exemption – Mayor – November 7, 2017



Uploading Documents

- Document Name Templates
 - **Two Business Day Report**– *First name, Last Name – Year | Document Name – Office Name - Election Date (Date of the Special or General Election)*
 - **EX:** John Doe – 2020 Two Business Day Report or TBDR – Coroner – November 3, 2020
 - **EX:** Sally Smith – 2021 TBDR – Mayor – November 2, 2021
- The naming template is **NOT** optional. You must following the naming template when uploading documents to the new e-filing system.
- Choose the Date Received.
- If you have any comments that you want to add, add them to the Comments section.
- Click ***Import***





Uploading Documents

- After you import your documents, they will appear under the *Correspondence/Documents Images* tab.

CORRESPONDENCE/DOCUMENT IMAGES					
CORRESPONDENCE/DOCUMENT IMAGES				UPLOAD	Document Type ▾
Document Name	Document Type	Date Filed	Document Privacy	Date Returned	Actions
Credentials Email - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Adel	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Committee Acceptance - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
Pending New Registration - Susan James 0510	Auto-Imaged Correspondence	05/10/2021	Private		⋮
					4 results

- Any document uploaded in the new system will have a “Document Privacy” setting of **Public**.



Uploading Documents

- It is important to note that our system **DOES NOT** talk to third-party vendor applications i.e. EasyVote or other applications.
- If you are using a third-party vendor, you still have to upload the campaign finance documents to **OUR SYSTEM**.
- Documents should be uploaded in a timely manner. The schedule of when documents should be submitted to the Commission is on slide 12.
- Documents submitted the Commission will be visible to the public.



Qualifying Candidate Information

- Traditionally, Local Filing Officers have uploaded qualified candidate information using the QOERS system.
- That system is no longer available. Local Filing Officers will now have to upload that information to the new e-filing system (CFIS).
- Local Filing Officers will now have to fill out the Qualifying

Candidate Information Form and upload it to CFIS.

Qualified Candidate Information –

Election Date

County: Municipality:

Name:	Address:	Office Sought:	Qualified Date:
Ex: Bob Jones	123 Main Street SE Atlanta, GA 30031	City Council, District 1	May 3, 2021

Campaign Finance Commission University * Qualified Candidate Information Form * May 2021



Qualifying Candidate Information

- The Local Filing Officer will complete a Qualified Candidate Information Form within 10 days of the qualifying period ending after **EVERY** qualifying period.
- You will upload the Qualified Candidate Information Form the same way you upload other campaign finance documents. You will choose the Document Type of "Other – Public."
- You will have to input information for the:
 - Election Date
 - County and/or Municipality
 - Candidate Name
 - Candidate Address
 - Office Sought of Qualified Candidate
 - Qualifying Date



Election Outcome Information

- Traditionally, Local Filing Officers have uploaded election outcome information using the QOERS system.
- That system is no longer available. Local Filing Officers will now have to upload that information to the new e-filing system (CFIS).
- Local Filing Officers will now have to fill out the Election Outcome

Information Form and upload it to CFIS.

Election Outcome Information – <input type="text"/>		
Election Date		
County: <input type="text"/>	Municipality: <input type="text"/>	
Name: Ex: Bob Jones	Office Sought City Council, District 1	Election Outcome Won
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Campaign Finance Commission University * Qualified Candidate Information Form * May 2021



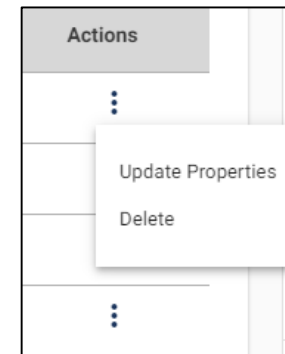
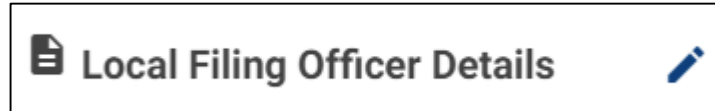
Election Outcome Information

- The Local Filing Officer will complete a Election Outcome Information Form within 10 days of the election results being certified after **EVERY** election.
- You will upload the Election Outcome Information Form the same way you upload other campaign finance documents. You will choose the Document Type of “Other – Public.”
- You will have to input information for the:
 - Election Date
 - Candidate Name
 - Office Sought of Qualified Candidate
 - Election Outcome – Won, Lost, or Runoff



Updating Account Information

- If the Local Filing Officer needs to update the information to their account, they will log into CFIS and click on ***Filer's Dashboard***.
- Click on the pencil icon next to Local Filing Officer Details, and update the account.
- If you need to update or delete an upload that was added in error, click on the three dots under Action.





Questions

- Feel free to contact the Education Department at hsmith@ethics.ga.gov or 404-463-7740.
- The education help desk is available from 9:30 am – 4:30 pm.

